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FinancialPlanning

Wealthtech Weekly

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Reporter

Long, large-scale internet outages that take down multiple websites at once have become more frequent. As AI coding tools proliferate, some warn the risk of these failures could grow — after all, a 13-hour Amazon Web Services disruption in mid-December was reportedly linked to engineers using an agentic AI coding tool.

Advisors can't control when these outages happen. But they can **take steps now to better protect and back up sensitive client data** before the next disruption hits.

Also worth your attention:

- Client relationships remain the **core of advisors' work, despite AI's growing role**
- The CEO of flat-fee startup Range **says AI could replace human advisors**
- **Turning off embedded AI features** might not be as simple as it sounds

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TOP STORIES

TECHNOLOGY

Big tech outages don't have to shut down business for prepared advisors

Firms might not be able to untangle the web's interconnected services, but they can think ahead and duplicate servers and data to prepare for the next outage.

- **Despite AI's allure, client relationships remain the crux of advisors' work**
  Even with all the advancements in artificial intelligence in the past few years, Financial Planning's new research shows human connection remains at the center of advisors' work.

- **Don't think AI will replace you? That's this CEO's goal**
  As Financial Planning's AI Readiness Survey showed, most advisors aren't concerned about their own jobs. But others aren't so sure.
- **Built-in AI isn't always easy to turn off — here's why that matters**
  New AI tools are often added to existing tech without fanfare, meaning that advisors who don't want to use them are forced to scour for ways to turn them off.
- **Some advisors rage against the machine learning**
  When it comes to certain AI tools — like those for content creation — concerns over copyright infringement, bland outputs and more have led some financial advisors to eschew the technology.

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PARTNER INSIGHTS FROM ORION REDTAIL

AI, client data, and the CRM: What advisors need to know now

This webinar will explore what to consider as AI capabilities expand, including risk, compliance, and the responsible use of client data.

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